

VISITOR EXPENDITURES BY CATEGORY

VISITOR SPENDING PATTERNS BY SELECTED MMA

Domestic U.S. West

Domestic U.S. East

International Japanese



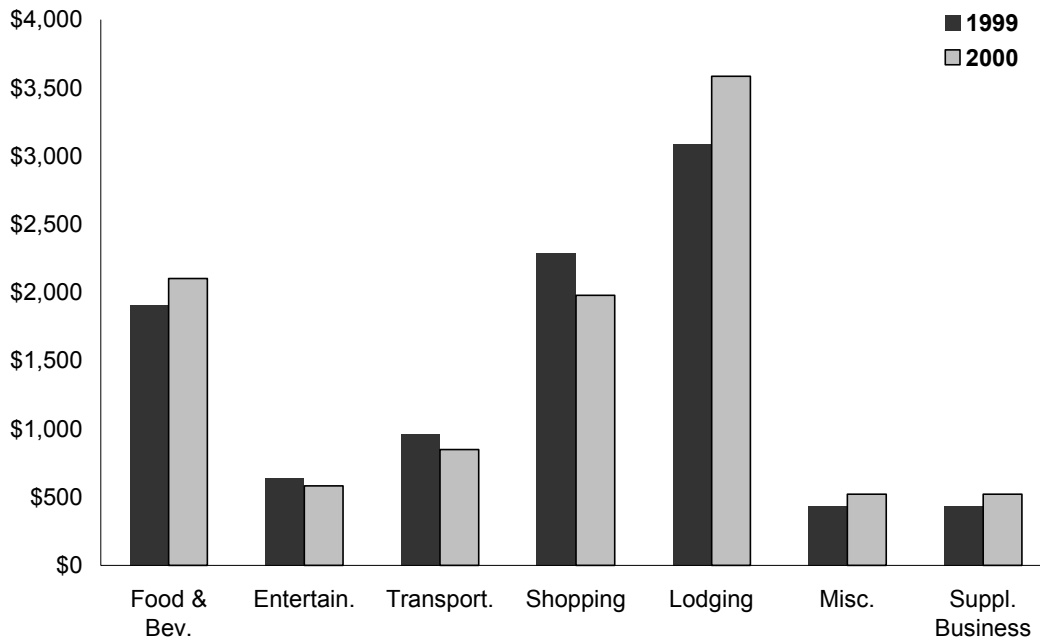
VISITOR EXPENDITURES BY CATEGORY

In 2000, growth in visitor days combined with higher per person per day spending, resulting in a 6.2 percent increase in total visitor expenditures to \$10.9 billion.

Lodging, the largest expenditure category, surged 16.0 percent to \$3.6 billion, or nearly 33 percent of total visitor expenditures. This was consistent with growth in both the 2000 Statewide average hotel occupancy rate (76%, up from 72.1%) and the average daily room rate (\$139.42, up from \$131.66).

Food and beverage, the second largest category, also climbed 10.2 percent to \$2.1 billion or 19.3 percent of the total. Partially offsetting these increases was a 13.6 percent decline in shopping expenditures to \$2.0 billion. This decrease was largely due to a drop in fashion expenditures (-11.9%), primarily from the Japanese market.

**FIGURE 10: Total Visitor Expenditures by Category: 2000 vs. 1999
(in millions)**



Source: DBEDT

VISITOR SPENDING PATTERNS BY SELECTED MMAS ^{1/}

Domestic U.S. West. Average daily spending for Domestic U.S. West visitors climbed 14.5 percent over the previous year to \$160 per day. Lodging expenditures rose dramatically (+46.1%) compared to 1999 to account for nearly 43 percent of expenditures for these visitors. This group spent more on food and beverages than on shopping during the year. Food and beverage expenditures increased (+11.1%) to 22.4 percent of the total, while shopping fell (-8.3%) to a 12.9 percent share.

Domestic U.S. East. Domestic U.S. East visitors' per person per day expenditures grew 5.0 percent to \$186. Similar to their U.S. West counterparts, lodging expenditures for this group increased (+9.1%) to account for nearly 39 percent of their total daily spending. Spending on food and beverages also rose (+4.1%) to 20.4 percent of the total. Shopping fell (-4.0%) to a 14.8 percent share of total expenditures, due to a drop in spending for souvenirs and agriculture products. Spending on fashion was virtually unchanged from 1999.

International Japanese. Spending by International Japanese visitors increased 3.0 percent to \$237 per person per day. This growth was due to a 38.1 percent jump in lodging expenses to \$83 per day, or a 35 percent share of daily expenditures. Shopping expenditures fell 13.7 percent from the previous year but still comprised 30.3 percent of daily spending by this market. Despite the drop in shopping expenditures, the Japanese spent nearly three times as much per day shopping than visitors from the U.S. mainland. Daily spending on food, beverages and entertainment by Japanese visitors was lower than visitors from the U.S. mainland.

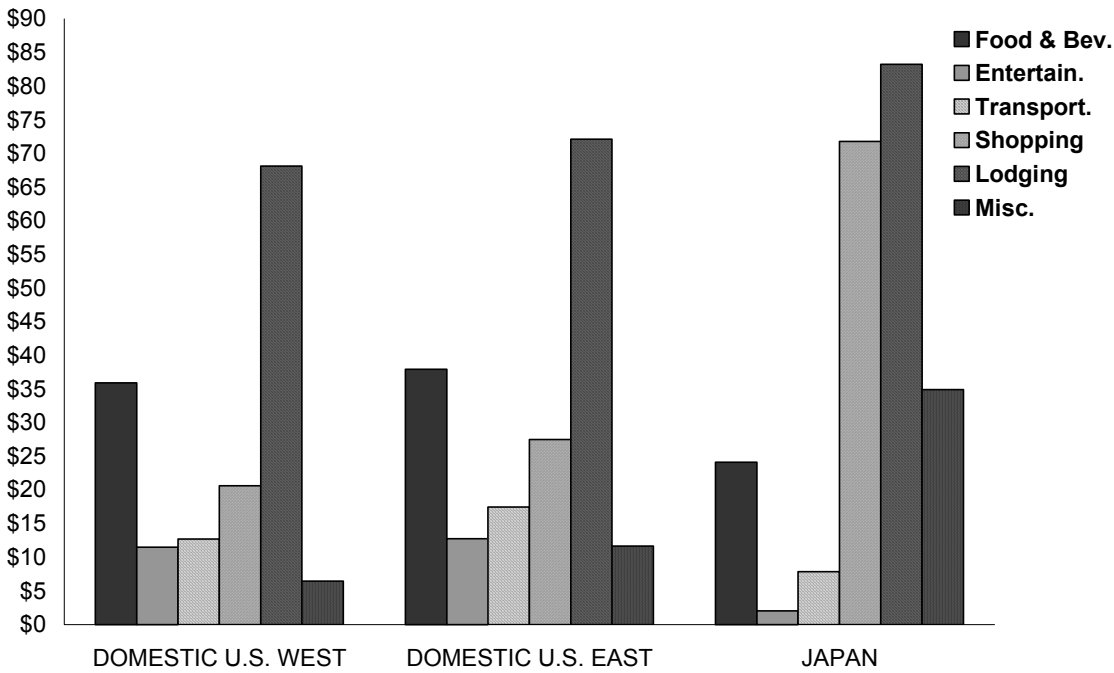
TECHNICAL NOTES

It must be noted that total lodging expenditures from the visitor surveys are higher than total revenues based on the transient accommodation tax. The lodging expenditures reported by visitors include taxes and tips, and may also include other purchases at the hotel. They also included payments for short-term rent of apartments and houses that may not be covered by the TAT.

Total expenditures take into account the visitors who did not stay at hotels during their vacation in Hawaii.

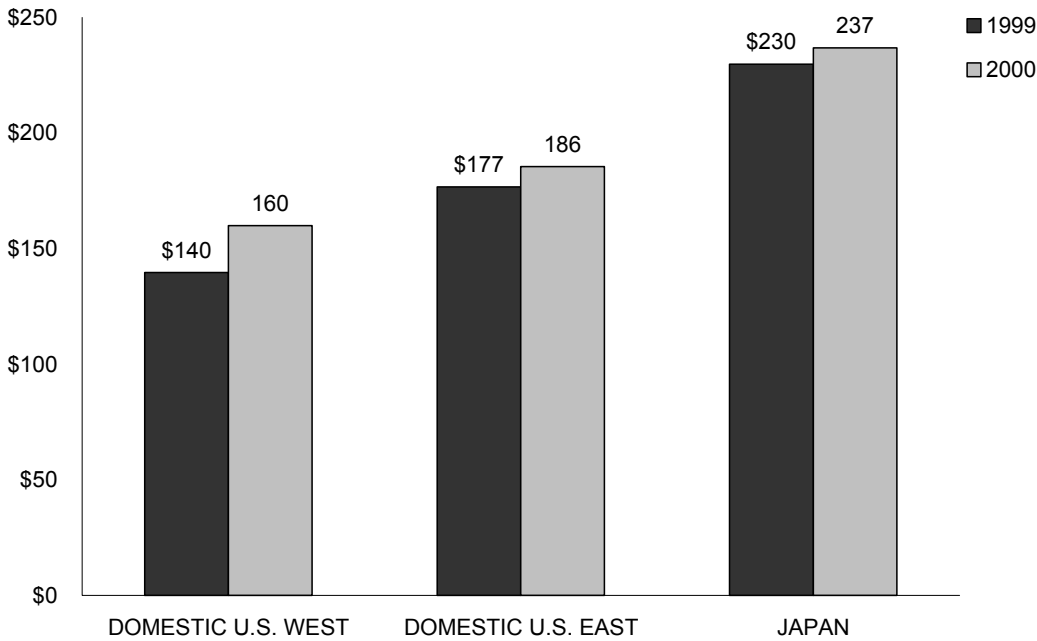
^{1/} Spending patterns are based on visitors staying only in hotels and condominiums.

FIGURE 11: 2000 Per Person Per Day Spending by Category and Selected MMA



Source: DBEDT

FIGURE 12: Per Person Per Day Spending by Selected MMA: 2000 vs. 1999



Source: DBEDT

TABLE 52: Visitor Expenditures by Category: 2000 vs. 1999

| Expenditure Type | 2000 | 1999 | % change |
|---------------------------------------|------------------|------------------|-----------------|
| GRAND TOTAL | 10,918.13 | 10,279.70 | 6.2 |
| Total Food & Beverage | 2,104.2 | 1,909.8 | 10.2 |
| Food at restaurant | 1,315.7 | 1,235.7 | 6.5 |
| Other food and groceries | 788.5 | 674.1 | 17.0 |
| Total Entertainment | 583.3 | 642.3 | -9.2 |
| Attractions | NA | 358.2 | NA |
| Sports | NA | 201.0 | NA |
| Other entertainment | NA | 83.1 | NA |
| Total Transportation | 849.1 | 962.5 | -11.8 |
| Interisland travel | 199.1 | 251.0 | -20.7 |
| Ground transportation | 88.2 | 135.4 | -34.9 |
| Rental vehicles | 456.6 | 442.4 | 3.2 |
| Gasoline and parking | 53.8 | NA | NA |
| Other transportation expense | 51.5 | NA | NA |
| Tour Pak Expense not Allocated | 419.9 | 258.2 | 62.6 |
| Total Shopping Expenditures | 1,980.3 | 2,291.4 | -13.6 |
| Total Fashion | 1,186.2 | 1,345.9 | -11.9 |
| Clothing | 647.8 | 738.0 | -12.2 |
| Jewelry and watches | 315.2 | 365.8 | -13.8 |
| Consmetics and ferfumes | 56.3 | 70.1 | -19.7 |
| Leather goods | 167.0 | 171.9 | -2.9 |
| Total Agriculture | 102.4 | 137.5 | -25.5 |
| Total Souvenirs | 362.1 | 475.2 | -23.8 |
| Total Other Shopping | 329.6 | 332.9 | -1.0 |
| Total Communications | NA | 40.7 | NA |
| Total Personal Services | NA | 84.4 | NA |
| Beauty/barber/laundry, etc. | NA | 30.4 | NA |
| Sundries/drugs/tips | NA | 54.0 | NA |
| Total Lodging | 3,587.9 | 3,093.5 | 16.0 |
| All Other/Miscellaneous | 871.0 | 561.2 | 55.2 |
| Supplemental Business Spending | 522.3 | 435.7 | 19.9 |

NA: Not available
Source: DBEDT

TABLE 53: Domestic U.S. West Personal Daily Spending by Category: 2000 vs. 1999

| Expenditure Type | 2000 | 1999 | % change |
|---------------------------------------|--------------|--------------|-----------------|
| GRAND TOTAL | 160.1 | 139.8 | 14.5% |
| Total Food & Beverage | 35.9 | 32.3 | 11.1% |
| Food at restaurant | 22.1 | 19.8 | 11.2% |
| Dinner shows and cruises | 4.7 | 6.0 | -22.4% |
| Dinner shows | 3.1 | 3.7 | -14.6% |
| Dinner or lunch cruise | 1.6 | 2.4 | -34.4% |
| Night club/bars | 2.9 | 2.0 | 42.2% |
| Groceries | 6.3 | 4.4 | 41.6% |
| Total Entertainment | 11.5 | 10.7 | 7.4% |
| Attractions | 4.7 | 6.6 | -29.4% |
| Sports | 6.1 | 3.4 | 76.2% |
| Other entertainment | 0.8 | 0.7 | 19.3% |
| Total Transportation | 12.7 | 15.4 | -17.3% |
| Interisland travel | 1.8 | 3.8 | -52.8% |
| Ground transportation | 8.2 | 7.7 | 5.7% |
| Rental vehicles | 1.1 | 2.2 | -50.2% |
| Gasoline | 1.0 | 1.0 | 2.9% |
| Parking expense | 0.7 | 0.7 | -1.0% |
| Tour Pak Expense not allocated | 4.7 | 4.2 | 10.7% |
| Total Shopping Expenditures | 20.6 | 22.5 | -8.3% |
| Total Fashion | 15.6 | 15.5 | 0.7% |
| Fashion and clothing | 8.1 | 8.7 | -7.3% |
| Clothing (casual) | 5.9 | 7.2 | -19.0% |
| Clothing (designer wear) | 2.2 | 1.5 | 50.2% |
| Jewelry and watches | 4.3 | 4.8 | -9.9% |
| Cosmetics and perfumes | 0.3 | 0.2 | 26.6% |
| Leather goods | 0.3 | 0.2 | 61.7% |
| Other fashion items | 2.6 | 1.6 | 65.3% |
| Hawaii Food Products | 1.4 | 1.8 | -20.6% |
| Total Souvenirs | 3.6 | 5.2 | -30.9% |
| Total Communications | NA | 0.6 | NA |
| Total Personal Services | NA | 1.6 | NA |
| Beauty/barber/laundry, etc. | NA | 0.4 | NA |
| Sundries/drugs/tips | NA | 1.1 | NA |
| Total Lodging ^{1/} | 68.1 | 46.6 | 46.1% |
| All Other/Miscellaneous | 6.5 | 5.9 | 10.6% |

^{1/} This category only applies to visitors staying in hotels and condominiums.

NA: Not available

Source: DBEDT

TABLE 54: Domestic U.S. East Personal Daily Spending by Category: 2000 vs. 1999

| Expenditure Type | 2000 | 1999 | % change |
|---------------------------------------|--------------|--------------|-----------------|
| GRAND TOTAL | 185.6 | 176.8 | 5.0% |
| Total Food & Beverage | 37.9 | 36.4 | 4.1% |
| Food at restaurant | 25.3 | 22.8 | 10.8% |
| Dinner shows and cruises | 5.7 | 7.4 | -22.5% |
| Dinner shows | 3.7 | 4.2 | -11.1% |
| Dinner or lunch cruise | 2.0 | 3.2 | -37.3% |
| Night club/bars | 2.7 | 2.5 | 8.0% |
| Groceries | 4.2 | 3.7 | 13.6% |
| Total Entertainment | 12.8 | 13.9 | -8.4% |
| Attractions | 6.5 | 7.8 | -15.7% |
| Sports | 5.5 | 5.5 | 0.9% |
| Other entertainment | 0.7 | 0.7 | 0.2% |
| Total Transportation | 17.5 | 18.2 | -4.0% |
| Interisland travel | 3.7 | 4.6 | -19.2% |
| Ground transportation | 9.8 | 9.2 | 7.0% |
| Rental vehicles | 1.6 | 2.5 | -35.5% |
| Gasoline | 1.2 | 1.0 | 21.8% |
| Parking expense | 1.1 | 0.9 | 19.1% |
| Tour Pak Expense not allocated | 6.1 | 6.0 | 1.2% |
| Total Shopping Expenditures | 27.5 | 28.7 | -4.0% |
| Total Fashion | 20.3 | 20.3 | -0.1% |
| Fashion and clothing | 9.6 | 11.7 | -18.1% |
| Clothing (casual) | 6.9 | 9.7 | -28.5% |
| Clothing (designer wear) | 2.6 | 2.0 | 32.3% |
| Jewelry and watches | 5.7 | 6.2 | -8.3% |
| Cosmetics and perfumes | 0.3 | 0.3 | 9.4% |
| Leather goods | 0.3 | 0.5 | -36.4% |
| Other fashion items | 4.4 | 1.6 | 175.7% |
| Total Agriculture | 1.6 | 2.0 | -18.1% |
| Total Souvenirs | 5.6 | 6.4 | -12.3% |
| Total Communications | NA | 1.1 | NA |
| Total Personal Services | NA | 2.0 | NA |
| Beauty/barber/laundry, etc. | NA | 0.9 | NA |
| Sundries/drugs/tips | NA | 1.0 | NA |
| Total Lodging ^{1/} | 72.1 | 66.1 | 9.1% |
| All Other/Miscellaneous | 11.7 | 4.4 | 165.9% |

^{1/} This category only applies to visitors staying in hotels and condominiums.

NA: Not available

Source: DBEDT

TABLE 55: International Japanese Personal Daily Spending by Category: 2000 vs. 1999

| Expenditure Type | 2000 | 1999 | % change |
|---------------------------------------|--------------|--------------|-----------------|
| GRAND TOTAL | 236.9 | 229.9 | 3.0% |
| Total Food & Beverage | 24.2 | 34.1 | -29.2% |
| Food at restaurant | 13.6 | 14.2 | -4.2% |
| Dinner shows and cruises | 2.2 | 9.1 | -75.4% |
| Groceries | 2.8 | 3.8 | -26.4% |
| Other food expenditures | 5.5 | 7.0 | -21.0% |
| Total Entertainment | 2.0 | 4.4 | -53.3% |
| Attractions | NA | 1.4 | NA |
| Sports | NA | 0.7 | NA |
| Other entertainment | NA | 2.3 | NA |
| Total Transportation | 7.9 | 9.8 | -20.0% |
| Interisland travel | 4.6 | 4.9 | -4.7% |
| Ground transportation | 0.8 | 1.9 | -56.5% |
| Rental vehicles | 1.9 | 2.1 | -10.8% |
| Gasoline and parking | 0.1 | 0.4 | -64.1% |
| Other transportation expenditures | 0.4 | 0.6 | -35.0% |
| Tour Pak Expense not allocated | 12.9 | 2.1 | 514.3% |
| Total Shopping Expenditures | 71.8 | 83.2 | -13.7% |
| Total Fashion | 43.8 | 49.1 | -10.7% |
| Fashion and clothing | 17.8 | 21.1 | -15.6% |
| Jewelry and watches | 8.3 | 9.1 | -8.7% |
| Cosmetics and perfumes | 3.3 | 4.5 | -26.5% |
| Leather goods | 14.4 | 14.4 | 0.1% |
| Total Agriculture | 2.1 | 2.7 | -24.0% |
| Other shopping | 12.5 | 15.9 | -21.4% |
| Total Souvenirs | 13.4 | 15.5 | -13.5% |
| Total Lodging ^{1/} | 83.3 | 60.3 | 38.1% |
| All Other/Miscellaneous | 34.9 | 36.1 | -3.2% |

^{1/} This category only applies to visitors staying in hotels and condominiums.

NA: Not available

Source: DBEDT